

**BID SOLICITATION  
FOR FUNDRAISING SERVICES  
FOR THE STATE BAR OF CALIFORNIA  
LAWYER ASSISTANCE PROGRAM**

The State Bar of California (“State Bar”) is seeking bids from fundraising professionals to assist the staff of the Lawyer Assistance Program (“LAP”) and to take the lead role in soliciting charitable contributions from the legal community and from vendors who service the legal community to provide funds to pay for treatment for indigent attorneys. This effort will be in conjunction with the fundraising event “Save a Career, Save a Life,” to be held in Santa Monica on Saturday, January 21, 2006. To be considered for this contract, bidders must have a track record of successfully raising funds for charitable purposes.

The State Bar is a constitutional agency established as a public corporation in the judicial branch of government. The State Bar, which acts as an administrative arm of the California Supreme Court, is responsible for the admission and discipline of attorneys. Recently, pursuant to Senate Bill 479 (Burton), Business & Professions (B&P) Code Section 6230 et seq., the State Bar set up the LAP to assist in the rehabilitation of attorneys who have problems with substance abuse or mental illness. The program offers support and structure for attorneys recovering from these disorders. Experts provide consultation regarding rehabilitation and arrangements for treatment, and professionally facilitated support groups are offered to the attorneys in the program.

Through the LAP Financial Assistance Plan, the State Bar also provides loans to indigent participants in the LAP to cover the cost of various forms of treatment. The monies generated by this fundraising effort will augment the Financial Assistance Plan.

The State Bar is looking for a fundraising professional, preferably with the following attributes:

- A successful track record of generating contributions from individuals and from organizations in the legal and/or business community;
- Excellent ability to communicate verbally and in writing;
- Experience in promoting fundraising events;
- Interest in promoting the treatment of chemical dependency and mental illness; and,
- Ability to work well both independently and as part of a team

**This is an independent contractor position. Bidders must be available to begin work by March 1, 2005 and be available to continue this effort, at a minimum, through September 30, 2005. The initial contract will be for a period of 200 hours, with the possibility of an extension if fundraising targets are met. With input from LAP staff, contractor will:**

- Identify potential donors

- ❑ Determine a strategy for approaching potential donors
- ❑ Prepare a package of solicitation materials
- ❑ Make contact with potential donors via written materials, phone calls, and/or presentations
- ❑ Follow-up and secure contributions

### **Submission Requirements**

The submission requirements for the bid are detailed below. Information contained in the bid is confidential and shall remain so until a contract is signed.

Responses to this Bid Solicitation must contain the following information:

1. Statement of the qualifications, background and experience of the bidder, including a description of similar projects completed within the past 3 years.
2. A list of at least three (3) organizations for which you have performed similar projects. Include a reference or contact person for each.
3. An overall description of the techniques, approaches, and methods to be used in performing the project.
4. The hourly rate for the services to be provided, and any additional anticipated charges.

### **Rejection of Bids**

The State Bar reserves the right to reject any or all submissions in whole or in part for any reason without incurring any cost or liability whatsoever. All bids will be reviewed for completeness of the submission requirements. If a bid fails to meet a material requirement in the Bid Solicitation, or if it is incomplete or contains irregularities, then the bid may be rejected. A deviation is material to the extent that a response is not in substantial accord with the requirements in the Bid Solicitation.

Immaterial deviations may cause a bid to be rejected. The State Bar may or may not waive an immaterial deviation or defect in a bid. The State Bar's waiver of an immaterial deviation or defect shall in no way modify the Bid Solicitation or excuse a vendor from full compliance with solicitation document specifications.

All bids may be rejected in any case where it is determined that the bids are not really competitive, or where the cost is not reasonable.

Bids that contain false or misleading statements may be rejected if in the State Bar's opinion the information was intended to mislead the State Bar regarding a requirement of the Bid Solicitation.

## **Selection of Bidder**

**Upon selection of a winning bidder, the State Bar will enter into contract negotiations for an independent contractor agreement. No contract, express or implied, shall exist or be binding on the State Bar before the execution of a written contract by both parties. If agreement on the terms of such a contract cannot be reached after a period deemed reasonable by the State Bar in its sole discretion, the State Bar may enter into negotiations and sign a contract with any other bidder who submitted a timely, responsive and responsible bid to this solicitation.**

**Please submit your bid by email or three written copies in a sealed envelope no later than 5:00 p.m., February 18, 2005.** All responses to the Bid Solicitation are to be submitted to:

Richard Carlton  
Deputy Director, Lawyer Assistance Program  
180 Howard Street  
San Francisco, CA 94105-1639  
Richard.carlton@calbar.ca.gov

Any technical questions regarding this Bid Solicitation may be directed to Richard Carlton, at the above address or by calling 415-538-2355, by fax at 415-538-2356, or via e-mail at richard.carlton@calbar.ca.gov.